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# statistical reporter

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**CONTENTS**


| *Page* | |
|---|---|
| 197 | IMPROVING THE FEDERAL STATISTICAL SYSTEM: REPORT OF THE PRESIDENT'S REORGANIZATION PROJECT FOR THE FEDERAL STATISTICAL SYSTEM |
| 213 | DISTRIBUTING FEDERAL ASSISTANCE: THE USE OF STATISTICAL DATA |
| 215 | POLICY ANALYSIS WITH SOCIAL SECURITY RESEARCH FILES |
| 220 | CURRENT DEVELOPMENTS |
| 220 | Census Releases Latest Population Estimates for U.S., States, and Counties |
| 221 | New BLS Data Relate Workers' Earnings to the Families in Which They Live |
| 221 | Conference Report on Women's Data Needs |
| 222 | Report on Black Colleges |
| 222 | Nonresident Alien Students in the U.S. |
| 222 | Government-Owned Fixed Capital in the United States, 1925-79 |
| 223 | Recent Energy Reports |
| 223 | Health Characteristics of Veterans and Nonveterans |
| 223 | VA Hospital Patients with Arthritic Conditions |
| 224 | Science Education Databook |
| 224 | Recent Social Security Reports |
| 225 | Public Health Conference on Records and Statistics |
| 226 | PERSONNEL NOTES |
| 227 | SCHEDULE OF RELEASE DATES FOR PRINCIPAL FEDERAL ECONOMIC INDICATORS |


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Health, Education, and Welfare

Robert M. Fisher
Federal Reserve Board

# *Improving the Federal Statistical System: Report of the President's Reorganization Project for the Federal Statistical System*


FEDERAL STATISTICAL SYSTEM PROJECT STAFF

James T. Bonnen, *Project Director*
*Professor of Agricultural Economics*
*Michigan State University (on leave)*

Theodore G. Clemence, *Statistician*
*Chief, Office of Program and Policy Development*
*Bureau of the Census*
*Department of Commerce*

Ivan P. Fellegi
*Assistant Chief Statistician*
*Statistics Canada (on leave)*

Thomas B. Jabine
*Chief Mathematical Statistician*
*Office of Research and Statistics*
*Social Security Administration*
*Department of Health, Education, and Welfare*

Ronald E. Kutscher, *Economist*
*Assistant Commissioner*
*Bureau of Labor Statistics*
*Department of Labor*

Larry K. Robertson, *Statistician*
*Economics, Statistics, and Cooperatives Service*
*U.S. Department of Agriculture*

Charles A. Waite
*Chief Economist*
*Bureau of Economic Analysis*
*Department of Commerce*

Doris Brown, *Secretary*
*National Science Foundation*

Helen Bowman, *Secretary*
*National Aeronautics and Space Administration*

Sylvia Kallenbach, *Secretary*
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*Department of Health, Education, and Welfare*

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*Maritime Administration*
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## *The Problems*

Unlike most countries, the United States has a decentralized statistical system. For most of its history this system has worked well. Starting with the constitutionally-mandated decennial census as a core activity, United States statistical agencies have, over the years, developed model statistical programs to serve the needs of policymakers and other users in agriculture, industry, domestic and foreign trade, labor, health, education and other areas. United States statistical agencies have pioneered in the development of new technologies, such as sampling and digital computers, which have greatly expanded the ability of all nations to collect, process and disseminate useful statistics.

In recent years, however, especially during the last two decades, this decentralized statistical system has lost some of its effectiveness. Major new demands have been placed upon it and there have been significant changes in the environment in which it operates. The role of government in society and the economy has greatly expanded. Billions of dollars are allocated to State and local governments every year under legislated formulas which depend on Federal statistical series. The total amount allocated by formulas has been estimated at around 60 billion dollars in Fiscal 1979, 29 billion of which was allocated using just six Federal statistical series. Even larger Federal expenditures and a major part of private sector wages are affected by Federal statistics on prices. There has been a large increase in the number of Government agencies and programs requiring statistical data to support policy decisions and the evaluation of their activities.

There are now more than 100 Federal agencies with statistical programs. Most of the general or multipurpose data provided by the Federal Government come from 38 agencies which are either entirely statistical or have major programs to collect or analyze statistics. The total budget of these 38 units has grown about ten-fold in real terms over the last 30 years to $945 million in 1979, and the number employed has grown five-fold to 30,000 in the same period.

The need for Government-wide planning and coordination of statistical programs has long been recognized. The unit created to perform this function

was located in the Office of Management and Budget (originally the Bureau of the Budget) from 1939 to 1977, following a 5-year history as the Central Statistical Board.

Initial efforts of the coordinating unit were relatively successful. However, this unit has not had the resources or the institutional authority to cope with the dramatic growth of data collection and analysis which have occurred in recent decades. In fact, its staff declined from 69 to 29 persons over the 30-year period from 1947 to 1977. The statistical policy and coordination functions today are understaffed even to meet minimal requirements and lack the institutional authority to ensure a cohesive statistical program across the Government.

National policy information needs now require a system performance. A decentralized statistical system can only function as a system with strong overall coordination and planning. Without such direction, it cannot properly be called a system, and it cannot deal effectively with the problems that afflict a fragmented, uncoordinated collection of statistical activities. The most important of these problems today are:

1. *Lack of policy relevance*—Greater analytical capacity is necessary to develop the information base for national level policy decisions of the President, the Cabinet, and Congress. Clearly established national statistical priorities are urgently needed. While the current system provides a wide variety of data, these data are not employed adequately for objective analyses of the complex issues which cut across present Department and policy decision structures. The system has frequently failed to anticipate the need for data to be used in dealing with emerging policy problems. Failure to anticipate major data requirements leads to unnecessary conflict over the nature of problems and policy options. As a consequence, it also leads to rising political pressures on statistics and statistical agencies. Analytical capacity applied to the development of policy information needs in the Executive Office of the President should also assist in identifying national priorities for statistics.
2. *Periodic threats to integrity*—For the public to trust the data provided by the Federal Statistical System, it must be sure that the data are not subject to actual or perceived manipulation and that the objectivity of Federal statistical data is fully protected. While the record is good, there have been occasional problems. Most important, the rapidly growing practice of using statistical data for indexing inflation and for allocating Federal expenditures is greatly increasing these concerns. Systematic vigilance and stronger institutional protection are needed.
3. *Inadequate quality*—The statistics produced in small statistical units, or as a by-product of administrative and regulatory data, are often unreliable and poorly designed for their purpose. For a variety of reasons, some beyond the control of the firms involved, the growing volume of contracted data collection and analysis are too frequently of poor statistical quality. Attention needs to be addressed to quality issues in agencies where data collection efforts are relatively small and where a "critical mass" of statistical know-how is not available.
4. *Inadequate protection of privacy of respondents who provide statistical records*—High quality data can be ensured only if the Federal Statistical System is able to promise effective protection of the confidentiality of data supplied by persons and businesses. In developing protection of confidentiality, there is also a need to reduce duplication and improve efficiency through authorized sharing of these data among Federal agencies but only for statistical purposes and under carefully controlled conditions.
5. *Excessive paperwork*—Although statistical data collection accounts for only three percent of the total Federal paperwork burden, this burden should be held to a minimum. Of greater significance, the methods used for reducing burden in statistical inquiries (sampling, standardization, synthetic estimates, etc.), should be aggressively applied in the collection of data by the Government for administrative and regulatory purposes. This could substantially reduce the burden imposed by administrative and regulatory agencies, and at the same time, make the data more generally useful.

The highly decentralized nature of Federal statistical work tends to serve rather effectively the policy needs of program agencies and Departments where statistical functions are well organized and managed. However, some Departments' statistical functions are not well ordered or developed. Also, the relevance of statistical work for Presidential, Congressional and other national level public decisionmaking, while substantial, is far short of both capacity and needs. Increasing the relevance of Federal data for national level policy purposes, protecting integrity, improving

the quality of data, achieving more efficient utilization of the great diversity of data already produced, and reducing the burden of paperwork on the public, all require greater central coordination of statistical activities.

## *II. The Statistical Reorganization Project*

Prior to 1977, the statistical policy and coordination and the reports clearance functions were performed by the Statistical Policy Division of the Office of Management and Budget (OMB). The coordination functions were transferred in October 1977 to the Department of Commerce by Reorganization Plan No. 1 of 1977 and placed in a newly created Office of Federal Statistical Policy and Standards (OFSPS). Reports clearance authority remained in OMB. OFSPS has legal authority to establish statistical policies and standards and to coordinate statistical programs under Section 103 of the Budget and Accounting Procedures Act of 1950. Its recommendations to OMB on statistical budgets and priorities are advisory, as are its recommendations regarding approval or disapproval of forms and reporting plans subject to the Federal Reports Act. These advisory roles are presently limited as a result of inadequate resources, less than effective planning mechanisms and the perception of being too closely associated with one Department's perspective.

The Statistical Policy Division grew increasingly vulnerable and was not functioning well in the OMB environment before statistical coordination and policy were transferred to the Commerce Department in 1977. The Administration indicated at the time that the move was not permanent and that a final decision on statistical policy and coordination functions would be made only after a complex evaluation of statistical problems and needs by the President's Reorganization Project.

Early in the Administration concerns were raised about various perceived statistical problems in Federal policymaking. It was soon apparent that a number of these concerns were widely shared in other parts of the Executive Branch, the Congress, the private sector, and in the Federal Statistical System and its associated disciplines and professions. It was suggested that as a part of the President's Reorganization Project, Federal statistics should be examined.

In July 1977, OMB convened a conference of major public and private users and producers of Federal statistics to help identify the problems of the Federal system and to evaluate their relative importance. The participants in the 1977 OMB conference on Federal statistical problems, the staff of the Statistical Reorganization Project, its Advisory Committee and virtually all, in or out of Government, who reveiwed the Project's November 1978 "Issues and Options" paper concluded that the coordination of our decentralized Federal Statistical System must be strengthened markedly. It is clear that the existing unit for statistical policy, coordination and standards—OFSPS—lacks both the institutional authority and resources to do what is needed.

It was subsequently decided that the problems were significant and warrented establishing a Statistical Reorganization Project. The Executive Director for the Project, Dr. James T. Bonnen of Michigan State University, was selected in the fall of 1977 and arrived in Washington on February 1, 1978, to begin work on the Project under direction of Wayne G. Granquist, Associate Director for Management and Regulatory Policy in OMB. A draft plan of work was developed and, following the President's formal announcement of the Project on May 11, 1978, it was distributed widely in and out of Government for review and suggested modifications.

Five Project Task Forces were formed in June 1978 from experienced statistical agency personnel. These Task Forces were established to review previous analyses of major statistical issues, to evaluate the possible alternatives and to make recommendations to the Project Director by the end of September 1978 (see p. 201). Also in June, an Advisory Committee to the Project was announced. Its eight members were experienced nongovernment users of Federal statistics (see p. 200). A small, highly capable and experienced staff recruited from statistical agencies was fully in place by early September 1978 (see p. 197).

FEDERAL STATISTICAL SYSTEM PROJECT
ADVISORY COMMITTEE

Graham T. Allison, Jr.
*Dean, Kennedy School of Government*
*Harvard University*
*Cambridge, Massachusetts*

Vincent P. Barabba
*Director of Marketing Research*
*Xerox Corporation*
*Rochester, New York*

Patrick Caddell
*President, Cambridge Survey Research*
*Washington, D.C.*

William H. Kruskal
*Dean, Division of the Social Sciences*
*The University of Chicago*
*Chicago, Illinois*

Richard Ruggles
*Professor*
*Department of Economics*
*Yale University*
*New Haven, Connecticut*

William H. Shaw
*Consultant*
*Silver Spring, Maryland*

Eleanor B. Sheldon
*President, Social Science Research Council*
*New York, New York*

Phyllis A. Wallace
*Professor*
*Department of Economics*
*Massachusetts Institute of Technology*
*Cambridge, Massachusetts*

Starting from the output of the Task Forces, the staff developed an "Issues and Options" paper, which defined the statistical issues and analyzed the feasibility and impact of possible alternative solutions. This paper was evaluated by the Project Advisory Committee at its second meeting on November 20-21, 1978. After editing, 400 copies were distributed widely in and outside of Government to elicit further critical review of the potential options. Following evaluation of the more than 200 responses, the Project presented a revised set of options for review by the Advisory Committee at its February 16-17, 1979, meeting.

It is possible to achieve stronger statistical coordination by centralizing existing statistical agencies in one or only a few organizational units, or by strengthening the authority, resources and institutions for coordination of the system. After extensive review of possible options, it was clear that centralization would cause major disruptions and such an approach was discarded.

The Project then began developing its recommendations which were discussed widely through the spring of 1979 with statistical agencies and others directly affected by the proposed changes. The authority, organization, and location of the statistical policy functions were explored at length. A Presidential Decision Memorandum was drafted and extensively reviewed in OMB before being sent by the Director to the President and to other Presidential advisors in the Executive Office in late December 1979. The President made his decision in mid-January 1980.

## FEDERAL STATISTICAL SYSTEM
## PROJECT TASK FORCES

1. *Planning and Coordination*

Joseph R. Antos, *Bureau of Labor Statistics*
Donald H. Barrowman, *Economics, Statistics, and Cooperatives Service*
Conrad Fritsch, *Economics, Statistics, and Cooperatives Service*
Paul E. Grayson, *Internal Revenue Service*
Max Shor, *Bureau of the Census*
Robert Tap, *Transportation Systems Center*
*Jack E. Triplett, *Bureau of Labor Statistics*
Charles A. Waite, *Bureau of Economic Analysis*

2. *Clearance and Respondent Burden*

Peter M. Cavas, *Bureau of the Census*
*William L. Copeland, *National Institutes of Health*
Richard J. Schrimper, *Economics, Statistics, and Cooperatives Service*

3. *Access to Data, Privacy and Confidentiality*

Lois A. Alexander, *Social Security Administration*
William Smith, Jr., *Internal Revenue Service*
Peter B. Yates, *Bureau of Labor Statistics*
*Paul T. Zeisset, *Bureau of the Census*

4. *Policy Relevance, Integrity and Quality of the Statistical System*

Yoshio Akiyama, *Federal Bureau of Investigation*
Charles Ardolini, *Bureau of Labor Statistics*
Norman Frumkin, *Bureau of Economic Analysis*
*W. Richard Johnsen, *Energy Information Administration*
Charles E. Johnson, Jr., *Bureau of the Census*
Don Luria, *Bureau of the Census*
Wes Mellow, *Bureau of Labor Statistics*

5. *Federal/State/Local Data Systems*

Paul A. Armknecht, *Bureau of Labor Statistics*
*Thomas R. Daugherty, *Energy Information Administration*
Dayton P. Jorgenson, *Bureau of the Census*
Lloyd E. Lyons, *Department of Housing and Urban Development*

*Other Supporting Personnel*

* *W. Lorn Harvey, *Energy Information Administration*
Henrietta Hyatt, *Department of Health, Education, and Welfare*
Betty Mahoney, *Department of Health, Education, and Welfare*
Gary Shapiro, *Bureau of the Census*
Randy Spoeri, *Bureau of the Census*
Eleanor Stockwell, *Federal Reserve Board*
Lewis Williams, *Bureau of the Census*

*Indicates Chairperson
* *Assistant to Project Director for Organizational Analysis

### *III. The Solution: An Office of Statistical Policy*

The Statistical Reorganization Project recommended, and the President approved, establishment of an Office of Statistical Policy (OSP) in the Executive Office of the President for the coordination of the Federal Statistical System. This Office would function as a separate agency in the Executive Office reporting to the President and accountable to the Congress.

The *mission of the Office* would be to:

- *Ensure* the *policy relevance, quality,* and *integrity* of statistical data and analyses produced by agencies of the Federal Statistical System.
- *Develop plans* so that the Federal Statistical System will be able *to meet future information needs efficiently* in the face of technological, social and economical changes;
- *Assist in minimizing the burden* on all persons and organizations asked to supply statistical or other data to the Federal Government;
- Maintain a proper *balance* between *protecting individual and business rights to privacy and confidentiality and meeting information needs for public policy.*

The Director of the Office of Statistical Policy with the authority and resources to carry out this mission, (1) would play a major role in identifying and responding to major information needs for national policy, (2) would serve when necessary, as the authoritative spokesperson for the Federal Statistical

System, and (3) would be able to make an effective attack on the problems described in Section I above.

*The specific functions assigned to the Office* of Statistical Policy to carry out its mission are listed below under six broad headings. For more detail see Appendix A.

*Program Planning*

- Fulfill a major role in coordinating planning and budgeting for Federal statistical programs (Section V below has a description of OSP's role in this area).
- Prepare long-range plans for adaptation of statistical programs to structural and technological changes.
- Promote effective use of administrative records and regulatory reports for statistical purposes.
- Develop legislative initiatives and review proposed legislation, regulations, and guidelines that affect Federal statistical programs.

*Review Clearance and Burden Control*

- Perform technical review of the statistical quality of all Federal data collection plans.
- Exercise delegated clearance authority for all statistical data collection plans and forms.
- Conduct research on the measurement and reduction of statistical response burden.

*Analysis and Integration*

- Conduct objective analyses of complex issues which involve statistical policy and require data from multiple sources.
- Coordinate the development of social and economic indicators.

*User Services*

- Maintain for users a central inquiry service for identifying and gaining access to appropriate Federal data.
- Establish and monitor standards to ensure maximum accessibility and utility of Federal statistics to all users.
- Conduct studies to improve understanding of user needs.
- Act as focal point for receipt of and response to data requests from international organizations.

*Statistical Standards*

- Establish and monitor standards to ensure the quality, integrity, and comparability of statistics and analyses produced by agencies of the Federal Statistical System. Where feasible, encourage compatibility with international standards.
- Provide technical assistance in statistical methods as needed to agencies undertaking or sponsoring statistical activities.
- Promote the professional development of employees of the Federal Statistical System.
- Coordinate and, as needed, conduct evaluations of Federal statistical agencies and their programs.

*Fair Information Practices*

- Carry out the functions assigned to the Director of the Office of Statistical Policy under the Confidentiality of Federal Statistical Records (legislation to be submitted to Congress) and other pertinent legislation, regulations and guidelines.

Except as noted in the last item, these functions are currently authorized by Section 103 of the Budget and Accounting Procedures Act of 1950.

## *IV. The Historical Experience In Statistical Policy*

The problems described earlier are pervasive, system-wide and have developed over a period of more than three decades. They will not be solved through well-intentioned exhortation or by returning to earlier organizational forms. The modern capabilities of statistical policy have changed in scope and nature, are not widely understood, and have become extremely important to the most critical function of Government—policy decision.

Thirty years ago statistical policy was as essential to the quality of statistical data as it is today, but other things have changed. The varied sectors of the society and economy are much more interdependent and the Federal Government's role has become pervasive and of immense import. Policy decisionmaking has become far more interactive and complex. The distinction between public and private has become blurred. As a result of this complexity, national policy decisions today are decisively dependent on quantitative measurement to identify and understand problems. Failures to provide accurate, coherent and relevant quantitative description and analysis now result in unnecessary policy confusion and societal conflict. We are paying a growing price for our neglect of statistical policy.

*Earlier institutional arrangements have grown increasingly vulnerable and are not working well.* Historically, statistical policy was combined with control of paperwork burden on both public and private sector respondents

and was located in a single unit. This unit was in OMB until 1977 and made many substantial contributions to the quality and value of Federal statistics. However, the growing importance of statistical policy as a function of decisionmaking has not been widely understood nor supported effectively. In addition, both statistical policy and paperwork functions have been overwhelmed by the more recent immense growth and changing nature of data collection and Government decisionmaking. Examination of this 30-year organizational experience suggests some institutional weaknesses and reasons for increasing vulnerability.

*OMB's budgetary functions were too different and too dominant.* Sound statistical policy requires long time horizons for highly technical coordination and planning, and a corresponding measure of freedon from short-run political and economic events, of whatever significance. OMB's primary function—Presidential budget development and oversight—involves immediate, often crises driven, decisions of great political and economic significance which dominate OMB's internal agenda and resource priorities. Statistical policy was not perceived as important in such an environment, was not understood, and slowly eroded in personnel and institutional strength.

Personnel numbers in the Statistical Policy Division of OMB declined by 60 percent in the 30 years between 1947 and 1977. This occurred despite the growing importance of statistics to the effectiveness of national policy decisionmaking. Simultaneously, statistical policy functions were pushed downward within the OMB decision structure and consequently were removed further from the policy dialogue where national information needs are most frequently formulated. Another consequence of this trend was erosion in the authority needed to coordinate decentralized statistical programs effectively.

The resolution of the trade offs between political or policy ends and the need to protect the integrity of statistics should not be solely an internal, perhaps lower level, OMB decision. What is at hazard, if mistakes are made in either direction, is now too important. Resolution should occur in a context where the integrity of both the policy functions and the statistical functions are maintained by reasonably visible, broad accountability and clear lines of functional authority.

There are other reasons why the earlier institutional arrangements ultimately have not worked well.

*Statistical policy now addresses many complex matters well beyond the scope of paperwork reduction.* The changing nature and growing significance of statistical policy as well as the broadening scope and complexity of statistical applications over the last few decades have destroyed an earlier degree of complementarity between statistical policy and paperwork reduction. Data collected for statistical purposes once accounted for a significant part of the total paperwork burden. Today, if one includes all collections covered by the original Federal Reports Act plus all tax forms, statistics account for only three percent of the total paperwork burden. In addition, statistical data collections are normally better designed than collections for administrative purposes. Thus, the real paperwork problem and the greatest potential for future reduction of burden lies outside the statistical system.

The scope of important statistical policy applications has changed and grown more varied and complex. The traditional focus of statistical policy has been on the quality of the product produced in statistical programs and agencies, and on development of the statistical potential and quality of administrative records. Most Government data were once collected by Federal agencies but today a rapidly growing volume are "contracted out" to private firms. These contracted collections are of quite uneven quality and present a difficult new challenge to the application of statistical standards. The development of new statistical measurement and collection techniques has combined with new and different policy information needs to create rapidly growing areas of data collection based on direct measurement and direct observation. These areas fall outside the scope of the Federal Reports Act since no respondent-filled form is even involved, and hence Reports Act control associated with prior approval of forms to collect data does not even come into play. Thus, for example, the growing statistical uses of satellite sensor data, air and water pollution measurements and many program experiments involve complex problems of statistical standards and coordination that have substantial impact on policy decisions.

As society's problems have grown more complex, statistics have become more important to effective decisionmaking. Not only do policymakers face increasingly complex issues, but many problems now interact with one another. Policy decisions more frequently involve choices which cut across present Department and policy decision structures and their data bases. Growing numbers of these crosscutting issues involve so many diverse participants that more and more Executive Branch decisions are being forced to the White House for resolution. Resolution of these

broader policy questions often create the need for new statistical data or require complex new combinations of older data. These data requirements are difficult, and sometimes impossible, to meet under present statistical policy institutional arrangements. Yet they are essential if national policy decisions are to be based on a firm factual foundation.

Statistical policy is now a critical and fragile part of the larger policy process and is not just an input into paperwork reduction. Consequently, the functions of statistical policy and paperwork reduction do not fit together in the same organization as logically or easily as once they did.

*The nature and significance of statistical policy has been transformed.* Federal statistics have a far greater impact on society today. Statistics are now used in a higher proportion of economically and politically significant decisions in policy and the allocation of Federal resources. In addition, with the growth of the Federal Government's role since World War II, the number of such decisions and their impact on society has sharply increased. As a consequence, national policy and resource allocation decisions are increasingly interactive with those of statistical policy. There is a greater need to anticipate national policy information needs through integrated planning of statistical products. The failure to coordinate the larger aspects of statistical policy with national policymaking is increasingly disruptive of that policy decision process when data are missing, misinterpreted, inaccurate, or are inappropriate for the decisions being made. This produces unnecessry policy conflict which can and should be avoided.

Closer coordination of statistical policy with national policy information needs creates another institutional requirement. To remain effective, statistical standard setting, planning and coordination must be neutral and objective in performance. Without its reputation for integrity, a statistic loses what value it has in resolving complex policy conflicts. Thus, closer coordination of statistical planning and the national policy decision process requires simultaneous strengthening of the institutional independence of statistical policy and the creation of visible accountability to protect integrity. Such accountability should be not only to the President, but to Congress, the Federal statistical agencies and to the many non-Federal users who are dependent on the continued objectivity and political neutrality of statistical policy.

There is another related, rapidly growing, and potentially dangerous problem. The capacity of individual agencies to maintain statistical integrity has become questionable and the statistical system more vulnerable with every new use of statistics to index expenditures for inflation and in formulas to allocate Federal funds to various beneficiaries. A very substantial part of our most important statistics is already held hostage to political ends by their visible and direct use in politically important decisions which allocate Federal resources. When the consequences that flow from those numbers are politically undesirable, the temptation to manipulate is often difficult to resist.

Program results which are highly desirable from the viewpoint of beneficiaries are sometimes created by biases that creep into statistics over long periods of time. This happens when statistical collection techniques and the concepts being measured fall behind a changing reality and no longer match that part of the real world being tracked by the numbers. Statistical revisions which are necessary to regain accuracy are then delayed or prevented by political resistance. This kind of mismatch is also often the direct consequence of the inappropriate use by policymakers of data designed for an entirely different purpose. This occurs most frequently when the statistical system has failed to anticipate major policy information needs and appropriate data are not available, as well as when policymakers act without understanding available alternatives. The data and analysis failures that follow, all too often, lead to situations which create temptations to adjust the data to the political goal. It is no solution, (it is not even responsible) to suggest that policymakers should not use statistics to allocate resources. The job of matching policy information needs and statistical capability must be made far more conscious and thoughtful.

The assurance of relevant, objective and accurate statistics presents a growing and difficult problem with frightening implications for our ability to govern. Loss of either relevance or integrity detroys the value of statistics for decisionmaking. Stronger, more visible and formal oversight from multiple sources is needed today, along with standards and procedural rules to protect the integrity of statistical products and processes. More systematic capacity to anticipate policy information needs is necessary. This cannot be accomplished without a stronger, more visibly independent, central coordinating unit which is well coordinated with the policy decision process and simultaneously made more directly accountable well beyond the Executive Branch to all major users of

Federal statistics. This cannot be accomplished within the older institutional arrangements.

## *V. Elements Of An Effective Office Of Statistical Policy*

The following elements are essential for an Office of Statistical Policy to be able to resolve the statistical policy problems affecting national policy decision-making:

- Adequate *authority* should be vested in the Office;
- Institutional arrangements should exist to ensure on a continuing basis that the output of the system will be *policy relevant*;
- The *integrity* of the statistical data base, coordinated by the Office, should be visibly preserved and strengthened;
- The authority of the Office should be embedded within a set of functions that collectively ensure the *knowledge and understanding by the Office* of both user needs and statistical system data problems; and
- The organization should have *durability*.

The implication of each of these requirements is addressed below:

*Authority of the Office of Statistical Policy*

1. Strong coordination of budget development for statistical programs is necessary to ensure that national, as opposed to separate departmental and agency, statistical priorities are identified and prevail within a decentralized statistical system. Historically, United States statistics have generally developed from the bottom, a program at a time, to support the mission of an agency. The initial design rarely anticipates multiple uses and the Department or agency normally resists spending its budget to serve the needs of users external to that mission. The growing incidence of complex, crosscutting isues assures the development of multiple use despite the Department's attitude. Many external decision uses come to have high, even dominant value. As a result, the uses of the output of most statistical agencies have, over time, extended well beyond the missions of their Departments. Yet there are only weak (or nonexistent) mechanisms to ensure that the priority data needs of this larger constituency are given adequate weight by the policy Departments in which most statistical agencies are located. This is a reality that requires stronger central policy coordination if the statistics used for multiple purposes are to have acceptable levels of relevance and accuracy, or indeed, if they are to exist at all in some cases.

   Strong statistical policy coordination will provide a system through which agencies plan more effectively, clearly establish priorities among proposals, and fully address all levels of data needs for decisions on policy and crosscutting issues in the formulation of the Federal budget. The nature of this relationship and the role of the Office in OMB's budget decision process were discussed with OMB by the Statistical Reorganization Project staff and an operational design developed. The Statistical Policy Coordination Committee and OFSPS have already been working on procedures recommended by the Project staff. The new arrangement will balance three essential elements of the budget process as it affects statistics; it will (1) strengthen central coordination of statistical budget plans, (2) recognize the authority of OMB in resource decisions, and (3) preserve the decentralized role of program agencies in meeting their own statistical needs. For a more detailed description of the Office's role, see Appendix B on page 210.

2. Within the clearance policies and paperwork budget goals set by OMB, the Office of Statistical Policy should administer the Federal Reports Act and burden budget authority for general-purpose statistics. The Federal Reports Act of 1942 authorizes the President to review all reporting plans and forms to be used in data collection by the Federal Government and either to permit or prohibit that collection. Coherent national priorities in the coordination of Government data collection can only be established and maintained if this authority, which has been progressively fragmented by statute since 1973, is brought back under central control. Currently proposed legislation (H.R. 6410) would achieve the objective in OMB. Executive Order No. 12174 of November 30, 1979 sets forth the President's paperwork control program. Under this Executive Order as well as the proposed legislation, OMB, while retaining responsibility for policy and oversight, may delegate operational responsibility to those agencies which demonstrate the capacity to implement paperwork policy and objectives. Thus, within the

clearance policies and paperwork budget goals set by OMB, the Statistical Reorganization Project recommended that the Office of Statistical Policy administer the Federal Reports Act and burden budget authority for general-purpose statistics. The regulations implementing Executive Order No. 12174 authorize the statistical policy unit (OFSPS currently) to conduct technical reviews of *all* data collection plans, including those that are not for statistical purposes. Any collection program whose technical design is found to be unsound will not receive OMB approval. The authority would not only insert the Office into the statistical agency planning process, but would be instrumental in reducing statistical paperwork burden *and* improving the quality of statistical collections.

3. Data collected for nonstatistical purposes have great statistical utility and even greater unrealized potential. This potential can often be substantially enhanced by minor changes in the forms used in the collection. Furthermore, the collection techniques involved are frequently unsound and often waste resources and impose greater than necessary paperwork burden. The Statistical Reorganization Project recommended that agencies be required to prepare a prospective data collection plan; a technical review of such plans would be conducted by the Office of Statistical Policy as a part of a preclearance review. As already indicated, those collections found to have unsound design will not receive OMB approval. Agencies without sufficient expertise to design adequate collection plans will be assisted by the Office in developing or arranging for that expertise.
4. A common statutory basis for the confidentiality of statistics must be established. Only the Census Bureau and the National Center for Health Statistics now have a statutory basis for the promise of confidentiality traditionally given respondents in statistical data collections. This ancient common law protection is increasingly threatened, especially by litigation. The only solution is a statute to protect statistical confidentiality. Individual agencies are now introducing their own legislation. If a Government-wide statute is not enacted soon, the Federal Statistical System will be further balkanized.

   The Statistical Reorganization Project has drafted legislation which would provide uniform confidentiality safeguards throughout the statistical system, reduce duplicative collections, and make more effective use, within the Federal Statistical System, of data collected by individual agencies. It strengthens the confidentiality of statistical records and permits a limited exchange, for statistical purposes only, of confidential statistical records between statistical agencies. Exchanges of records are subject to the approval of a "Chief Statistician" who should be the Director of the Office of Statistical Policy. The authority to administer this legislation must be insulated from partisan political influences and be visibly and broadly accountable at the highest possible level. It should not be lodged at a low level in the Executive Branch nor combined with nonstatistical functions.
5. The Director of the Office of Statistical Policy should be an Executive level III Presidential appointee confirmed by the Senate. This provides the authority appropriate to the role of the Director when representing the Federal Statistical System and as chair of the Council on Statistical Policy described below.
6. Adequate resources are necessary to sustain effective institutional authority. Measured against even minimal expectations of performance, the resources devoted to statistical policy and coordination over the last decade have been inadequate. To staff all functions adequately would require many times current personnel levels. This obviously cannot be achieved under present budget and economic conditions, but a modest start should be made. As the Office performs and as need requires, this resource base must be expanded if statistical policy is expected to perform its necessary functions.

*Ensuring the Policy Relevance of the Statistical System*

The relevance of statistics to policy issues and decisions is dependent on a number of attributes including quality, timeliness, and consistency between different data sources. In addition, statistics will not be relevant to policy concerns unless appropriate analyses are performed and there has been effective communication between policymakers and statistical planners in the development and use of the statistics. A large proportion of the substantive functions recommended to be vested in the Office are designed to address all of these issues.

To ensure effective policy input into the statistical planning process as well as a reverse flow of information on the potential effective uses of existing statis-

tical capacity, and to provide advice to the White House and Executive Office on statistical policy, the Office should be located in the Executive Office of the President (EOP). In addition, the Director of the Office should chair a new *Federal Council on Statistical Policy*, also located in the Executive Office. Agencies represented would include the Council of Economic Advisers, OMB, and other EOP organizations and Executive Branch agencies as deemed appropriate by the President. The Federal Reserve Board would be invited to be a member. The Council would review the annual statistical planning guidelines to be issued by the Office of Statistical Policy and provide advice on statistical programs and priorities.

*Integrity of the Office of Statistical Policy*

Executive Branch policymakers, legislators, and the general public must have a high level of trust in Government statistics as forming the factual bases for public policy. For this reason, the organization must be impartial in its work and perceived by the public to be neutral on political policy debates about national goals and issues. That neutrality should be protected by broad accountability. Thus, the Office should be sensitive to Presidential direction as to program priorities, responsive to Congressional oversight, and accountable to the general public and to other users of Federal statistics. It should be sufficiently independent to overcome any threats to the integrity of Federal statistics including possible efforts to politicize the manner in which statistical inquiries are formulated and data are gathered, analyzed, published, or otherwise disseminated.

These ends will be most nearly achieved under the following conditions:

1. The Director of the Office should be *appointed by the President, subject to confirmation by the Senate* from among individuals of the highest integrity, as well as outstanding professional and managerial experience and competence;
2. *Senior positions within the Office should be classified as career-reserved*;
3. *The administrative functions including appointment of senior personnel within the Office should be made the explicit responsibility of the Director*; and
4. Since the Federal statistical agencies provide most national statistics, and at the same time are dependent on the public for accurate responses, due consideration should be given to the needs of outside users and to the maintenance of the reputation for integrity of Federal statistics. Thus, an *external advisory committee* on statistical priorities should be created. Members of this committee should be selected without regard to their political affiliations. Some provision also needs to be made for external, independent technical evaluation, analysis and advice.

*Relating Authority to Expertise and Knowledge*

Authority without knowledge and expertise can be disruptive. Thus, the substantive functions of the Office, described earlier in Section V, serve a dual purpose: every one of them is designed to deal with specific problems of users of the statistical system, but at the same time each would involve the Office in sufficient substantive activities to render its oversight effective.

*Durability of Organization*

The Office of Statistical Policy should not be vulnerable to short-run fluctuations in mission, staffing levels, or location, and it should not be outmoded by tomorrow's crisis or by structural or functional reorganizations of other elements of Government. Therefore, the Office's mission and functions should be established in legislative form (as in a reorganization plan, not an Executive Order) and be subject to direct Congressional oversight and appropriations authority.

## *VI. Relationship To Current Paperwork Legislation*

Congress is considering paperwork legislation (H.R. 6410) which does many useful things. One feature of the bill which the Administration strongly opposes is the return of statistical policy functions to OMB, there to be combined with paperwork reduction, ADP policies and procurement planning, telecommunications, privacy, and records management. Combining statistical policy with this heterogeneous set of activities would be a mistake of major order. Whatever the outcome of H.R. 6410, the Administration will work with the Congress to implement the President's decision to create a more effective set of statistical policy institutions, as described above in Section III.

Managing information activities more efficiently is an admirable goal, but putting all information functions in one organization in OMB does not solve the many problems involved. Statistical policy has grown to be more than just another information management activity. It has become an intimate part of the national policy process. Statistical policy now involves matters of a very different order of magnitude than most information management activities.

Putting all information related functions in one organization may force conflict resolution, but in doing so it greatly increases the chance that such resolution will be at the expense of the integrity of the function with the least immediate political clout—which includes most of the longer-term policy planning and oversight activities. In such a mixed environment of multiple purposes, one is also unlikely to attract and hold the necessary cadre of top quality statistical professionals. Statistical policy would again be slowly squeezed out by competing functions which command more immediate attention due to their greater short run economic impacts (e.g., ADP budgets) and political significance (e.g., paperwork). The consequent losses would fall more directly on the legislative and executive decisionmakers than on the statistical system itself. The mere production of statistics will thrive even if there are failures to harness its output more effectively for guiding policy.

## *VII. Conclusion*

In the very public and open process used to consider various means for improving the design of statistical policy institutions, the independent or separate agency option has been repeatedly recommended as the most effective design by a wide range of different groups and individuals. Most of these have not been self-serving requests for separate treatment but recommendations for strengthening the capacity of statistical outputs to illuminate societal problems before decisions are made or laws enacted.

The earliest evaluation of location options came from the more than 200 responses to the Project's "Issues and Options" paper—received from statistical and policy agencies and individuals in the Government and from individuals and organizations in business, labor, universities, the professional organizations and foundations. The independent agency option was recommended to the Project by well over three quarters of those who evaluated the location options. The separate agency option was strongly recommended by the eight-person Advisory Committee to the Federal Statistical System Reorganization Project, a committee of distinguished and knowledgeable nongovernmental users of Federal statistics. The Statistical Policy Coordination Committee, composed of representatives from all Departments and several independent agencies also expressed equally strong support for the separate agency while expressing reservations about or opposing the other options.

In addition to the separate agency option, several other alternatives were seriously considered. These included returning statistical policy to OMB, strengthening the arrangements in the Commerce Department, establishing the Office of Statistical Policy as a unit in the General Services Administration, or alternatively in the Administrative Conference of the United States. These were all viewed as seriously flawed. The limitations of the OMB location have been discussed.

Strengthening present arrangements in the Commerce Department is flawed by several difficulties. There are many inherent conflicts when one Department attempts to coordinate the statistical programs of other Departments and Agencies. In addition, a government-wide statistical policy mission, while transcending the Commerce Department mission, would in many diverse ways, be subject to the policies of the Commerce Department. This problem would periodically undermine statistical policy processes and limit the authority and credibility of the coordinating unit. This in inherent and would be the case in any Department.

The option of establishing the Office of Statistical Policy in the General Services Administration (GSA) is flawed by isolation from the Executive Office environment where national policy information needs can best be perceived and by the vast difference in the functions of GSA and the Office of Statistical Policy. It was doubted that statistical policy would be understood or well supported in a housekeeping agency. The Administrative Conference of the United States, a small independent agency, was also perceived as having the same flaws as well as raising serious questions about the ability to protect the integrity of statistical policy if, as in some proposed versions, it was responsible for certain regulatory policy oversight activities.

The Office of Management and Budget recommended to the President and his advisor the creation of a separate Office of Statistical Policy located in the Executive Office. Despite the obvious disadvantage of adding personnel and a new agency to the Executive Office of the President, it is the superior option because it allows this function of the modern policy process to operate far more effectively than does any other option. Other Presidential advisors came to the same conclusion. This is the option the President chose.

Today we know very well what statistical policy involves, how to make its activities operational, how to judge its performance. We have more than 40 years experience in statistical policy, a function which has

as its knowledge base a mature, scientific discipline, statistics. With appropriate authority, institutions and resources, we can do it now and do it well.

We should not mix fragilely balanced institutions with inchoate activities. Many other information functions involve a mixture of activities that are only now being developed, knowledge areas that are not yet a mature basis for action, and skills that are vastly different from statistics. Quite different goals are in a developmental stage. Some information activities have greater political or economic impact in the short run and hold a potential for distorting and destroying longer-run coordination and planning activities such as statistical policy. Statistical policy today has too great and pervasive an impact on our capacity to illuminate societal problems and to act on critical choices to allow that to happen.

We have within reach a quantum improvement in the institutions of statistical policy. We should grasp that opportunity now.

## *Appendix A*

## *Functions Of The Office Of Statistical Policy*

This Appendix provides a more detailed description of the functions of the Office of Statistical Policy (OSP) outlined in Section III. Based on preliminary considerations of a suitable organizational structure for the OSP, individual functions might be grouped by functional areas under five associate directors and one special assistant to the director. There are, of course, other ways of organizing the same functions.

*Associate Director for Program Planning*

1. Direct, pursuant to the President's authority under Section 103 of the Budget and Accounting Procedures Act of 1950, in consultation with departments and agencies, the planning of proposals for statistical programs prior to the fiscal year for which funds would be requested, issue guidelines for the preparations of such plans, and make recommendations with respect to such plans to the OMB.

2. Undertake intermediate and long-range planning to ensure the responsiveness of the Federal Statistical System to changes in technology, social values and social and economic structures. Encourage and coordinate intermediate and long-range planning by Federal statistical agencies including the appropriate relative allocation of effort and resources (1) among data collection, data compilation and analysis, and (2) among different modes of data collection.

3. Reduce paperwork burden by promoting effective use of administrative and regulatory records for statistical purposes. Develop plans for and assign responsibility for the creation and maintenance of general and multipurpose sample data systems based on administrative records. Take appropriate steps to improve access to administrative and regulatory reports for statistical purposes. Recommend modification of reports forms to enhance their value for statistical purposes. Review all proposed Federal-State-local cooperative statistical activities.

4. Provide a legislative review and reference service for the Federal Statistical System. Monitor and review all proposed legislation, regulations and guidelines that affect Federal statistical activities. Insure that statistical agencies are informed of proposals that affect them, and coordinate agency responses and comments. As necessary, develop and submit to OMB proposed legislation on matters of general concern to the Federal Statistical System.

5. Act as executive secretariat for the President's Council on Statistical Policy.

*Associate Director for Review and Burden Control*

6. Exercise the President's authority under the Federal Reports Act for the clearance functions of the Act as they apply to data collections for statistical purposes, including all censuses and statistical surveys, and data collections conducted in support of program evaluation activities and program experiments, or to produce statistical information for program managers; perform a technical review of any data collection plans (including nonstatistical) subject to the Federal Reports Act which the Director of the OSP may select for such review; perform a technical review of any plans for data retrieval by direct measurement or observation which the Director of the OSP may select for such review; and make recommendations or provide waivers regarding such plans as deemed appropriate. Undertake methodological research to develop improved procedures for quantitative measurement of response burden and innovative methods of controlling and reducing burden. Arrange for technical assistance where statistical techniques can contribute to the reduction of response burden resulting from nonstatistical data collection activities.

*Associate Director for Analysis and Integration*

7. Establish and maintain applied analytical capacity in the Office of Statistical Policy to do objective analyses of system-wide crosscutting and structural issues to coordinate the development and im-

provement of economic, social and other models, and to identify problems of quality, redundance, gaps, inconsistencies and other weaknesses of data sources. Encourage the establishment of analytical units in the departments to provide more effective linkage between policymakers and the producers of statistics for the purpose of improving communication on information needs and data services.

8. Coordinate the development of economic and social indicators.

*Associate Director for User Services*

9. Establish a central inquiry service for users with a limited knowledge of Federal data sources. Establish and monitor guidelines and standards for the dissemination of data by Federal statistical agencies through publication, release of public use files and other means, with special attention to matters such as format and documentation of files, advance announcement and scheduling of releases, and pricing policies. Establish and monitor the operation of a Federal statistical data bank of aggregates. In cooperation with the Secretary of State, arrange for and review responses to requests for statistical information from intergovernmental organizations.

10. In order to develop a better understanding of the kinds and quality of data needed by users, undertake user studies and encourage studies by statistical agencies, including both user surveys and in-depth case studies of how Federal statistics are used in specific areas of public policy. Conduct seminars and training courses, either centrally or through statistical agencies, to help potential users make more effective use of the products of the Federal Statistical System.

*Associate Director for Statistical Standards*

11. In cooperation with the Office of Personnel Management, promote the professional development of personnel in statistical agencies and units through appropriate uses of training, classification standards and incentives. Using existing registers of statistical agency personnel, if available, or a special register established for the purpose, encourage temporary assignments for training purposes, and mobility between different data producing agencies, analytical units, and the Office of Statistical Policy. Advise on appointments to senior positions in statistical agencies.

12. Keep a register of all audits, evaluations and reviews of statistical agencies and units, and their programs and activities and of the statistical programs and activities of program agencies; recommend scheduling for such audits, evaluations and reviews; and have the authority and capability for performing audits, evaluations and reviews on a selected basis.

13. Develop and monitor the observance of standards to ensure the use of uniform definitions and classifications for statistical purposes when deemed appropriate, and to ensure that data collection and processing, analyses and dissemination are carried out according to high professional and technical standards. Assist in the development of standard definitions and classifications that are compatible to the extent feasible with those established by intergovernmental organizations.

14. Provide or arrange for technical assistance to agencies undertaking or sponsoring statistical activities but lacking the necessary technical staff; special emphasis should be placed on assisting in the development of RFP's which procure statistical services for these agencies. Provide or arrange for technical assistance to nonstatistical data collection activities where the application of statistical techniques can reduce response burden. Maintain an information service covering data collection, processing and analysis procedures of interest to Federal statistical agencies. Organize and coordinate interagency groups to study methodological issues that are of particular importance to the performance of the Federal Statistical System.

*Special Assistant for Fair Information Practices*

15. Coordinate and monitor the policies and practices of departments and agencies with respect to the collection, maintenance, use, protection, and disclosure of individually identifiable information for statistical and research purposes in accordance with applicable statutes. To the extent consistent with law, the Director of the Office of Statistical Policy is authorized to approve, require, or prohibit the transfer of information to be used solely for statistical and research purposes, and may issue such regulations as deemed appropriate to accomplish this function.

## *Appendix B*

## *The Role Of Statistical Coordination In The Development Of The Federal Budget*

A key element of the redesigned central statistical coordination function is the role and authority of the Office of Statistical Policy (OSP) with respect to the development of statistical program budgets and priorities. The specification of this role must meet three objectives: (1) provide Congress, the President, and his advisors with more coherent and relevant information by developing and implementing national

level priorities; (2) use existing coordinating mechanisms that have worked well in the past but have not been sufficiently systematic; and (3) facilitate, rather than disrupt, the existing mechanisms through which the Office of Management and Budget (OMB) develops the budget of the United States.

The existing statistical coordinating office (Office of Federal Statistical Policy and Standards, U.S. Department of Commerce) now has, and the Office of Statistical Policy would continue to exercise the President's authority under Section 103 of the Budget and Accounting Procedures Act of 1950 to coordinate the planning and development of statistical programs. The OSP will also direct a multiyear planning process through which emerging data needs and related policy concerns are given more effective attention as a part of budget formation.

### MULTIYEAR STATISTICAL PLANNING

The design of this planning process has several major features. As a part of departmental budget formation, each year the OSP would formulate statistical planning guidelines. Before going to the agencies these planning guidelines will be reviewed/revised and approved by the President's Council on Statistical Policy in the Executive Office of the President (EOP), composed of policy representatives of the departments plus OMB, the Council of Economic Advisors (CEA) and other Executive Branch and EOP organization representatives as designated by the President. Subsequently statistical and program agencies will present to the OSP data collection plans and estimates of resource requirements for a multi-year period. Through ongoing consultations, OSP will provide guidance on the plans with respect to national information needs and priorities.

Agencies will consider this guidance as they formulate their budget proposals for statistics, before their submission to departments. Following the presentation of departmental budgets to OMB, the OSP will review these more formal submissions and provide further guidance as appropriate. The OSP will then formulate its own recommendations and discuss these with OMB budget examiners. In this phase, the OSP will assist OMB in an advisory capacity.

### OSP PARTICIPATION IN THE OMB BUDGET PROCESS

As the OMB budget development process advances, the OSP would participate in OMB budget hearings and develop analyses of statistical programs for OMB/OSP review. The OSP will prepare for a crosscut review of Federal statistical program proposals in which OMB and the OSP jointly review selected statistical program or policy issues with significant budgetary implications. In the crosscut review, the OSP will present final advice from the President's Council on Statistical Policy. As chair of this EOP Council, the Director of OSP will ensure that the Council's advice constitutes department level policy input as well as advice from representatives from other EOP units. The work of the Council will be staffed by the OSP. The Council will use interagency subcommittees as needed, and relate directly to or continue to use existing units such as the Economic Statistics Committee chaired by CEA.

Throughout this process, the traditional roles and authorities of OMB are unmodified; if the design is carried out systematically, the role of the OSP should facilitate the work of OMB and department budget examiners as well as provide an institutional framework to assist the OMB Director in resolving any major statistical budget/policy issues.

Most of the basic elements of this process have been performed in the past, some, however, on an ad hoc basis and without an adequate institutional focus for statistical planning or staffing. Formalizing this process will result in a regular calendar of statistical program budget reviews, effective advance planning and consultation among the components of the Federal Statistical System, and a comprehensive review of statistical program proposals in terms of their consistency with the information and policy needs of the Administration, the Congress, and data users generally.

### CONCLUSION

Success in developing this comprehensive review depends critically on the OSP role with respect to the Council on Statistical Policy, which is designed to ensure the broadest possible perspective on the relevance and utility of Federal statistics. Various other functions of the OSP will play a supportive role in this process, including the review and approval of statistical report forms and the provision of technical assistance to the smaller statistical units throughout Government.

It is equally important that the OSP staff and the OMB budget staff maintain an ongoing working relationship; this is most likely to be successful if OSP personnel, who are also serving as staff to the Council on Statistical Policy, are located in close physical

proximity to OMB budget staff and if there are clear guidelines governing the relationship between OMB and the OSP.

For a tentative outline of the steps in the statistical planning and budgeting process, see the schedule of events which follows.

STATISTICAL PLANNING AND BUDGET PROCESS

I. MultiYear Statistical Planning

*October-December: 15-12 Months before OMB Director's Final Budget Decision:*

| | | |
|---|---|---|
| 1. | November | EOP *Council on Statistical Policy* (CSP) reviews, modifies and approves the *Office of Statistical Policy* (OSP) planning guidelines which then go to the agencies and OMB. |

*January-June: 11-6 Months before OMB Director's Final Budget Decision:*

| | | |
|---|---|---|
| 2. | January-March | *Agencies* develop their multiyear statistical plans and transmit to OSP. |
| 3. | March-April | OSP reviews agency statistical plans and discusses with OMB examiners |
| 4. | April-May | OSP conducts spring planning discussions with agencies and provides comments on their statistical plans. OMB examiners invited to participate. |

II. OMB Budget Process With OSP Participation

*April-June: 8-6 Months before OMB Director's Final Budget Decision:*

| | | |
|---|---|---|
| 5. | April-May | OSP participation in OMB Spring Review. |
| 6. | June | OMB *Budget Guidelines* to agencies. |

*July-December: 5-0 Months before OMB Director's Final Budget Decision:*

| | | |
|---|---|---|
| 7. | July-September | Agencies develop their budget proposals. |
| 8. | September 15 | Agency budgets due in OMB including the statistical program Exhibit 54. |
| 9. | September | OMB sends statistical agency/unit budgets and Exhibits 54's to OSP. |
| 10. | Mid-September-October | OSP participates in appropriate *OMB budget hearings.* |
| 11. | Mid-September-October | OSP consults with departments, statistical agencies/units and OMB budget examiners in preparing an analysis of statistical program budgets. |
| 12. | Mid-October | The above analysis is reviewed by EOP Council on Statistical Policy (CSP) in developing its recommendations on statistical priorities. These recommendations are sent to OMB and are used by OSP in developing issues for OMB Director's reviews. |
| 13. | Mid-October-late November | *OMB Director's Review* of all agency budgets including statistical program issues. As needed, OSP prepares multiagency statistical crosscut with major policy issues for OMB Director's review. |
| 14. | Mid-November | As needed, *OMB Director's Crosscut Review* of statistical issues and final decision by OMB Director on statistical components of President's budget. CSP recommendations developed in step 12 and OMB mark sent to agency. |
| 15. | Late November through December | Agency appeals to OMB and to President. |

# *Distributing Federal Assistance:*

## *The Use of Statistical Data*

By Danuta Emery
*Office of Federal Statistical Policy and Standards*
*U.S. Department of Commerce*

Because of the expanded use of statistical data in distributing Federal funds, the Office of Federal Statistical Policy and Standards (OFSPS) has initiated a survey of all domestic assistance programs. This article describes the objectives, scope and methodology of the study which is pertinent to major, crosscutting statistical policy issues. Results of the study will be published in the *Statistical Reporter*.

### *Background*

In the wake of a strong political consensus to trim government budgets, there is a great deal of interest and controversy concerning the use of data in allocating funds. This interest has been stirred by debate over the effects of a potential census undercount, by computer technology which makes it relatively easy to test alternative formulas, and by the belief that scarce funds should be targeted equitably to the most needy recipients. While information on Federal assistance programs is provided to the public through the Office of Management and Budget's (OMB) *Catalog of Federal Domestic Assistance*, there is at present, no complete listing of programs allocating funds on the basis of statistical data. Consequently, linkages between statistical series and dollar outlays cannot be made. In addition, policy decisions on data improvement and on the development of new statistical series are made, of necessity, without weighing their implications on allocations of Federal benefits.

### *Objectives*

While the overall objective of the study is to develop benchmark information on domestic assistance programs using statistical data to allocate funds, the effort will also have utility for several statistical policy purposes. Findings will be used to establish priorities for data improvement, to strengthen coordination between assistance and statistical agencies, to insure the application of appropriate statistical standards to allocation formulas, and to develop linkages between statistical series and Federal outlays. These objectives are consistent with Section 103 of the Budget and Accounting Procedures Act of 1950 which authorizes the President[1] to issue regulations for the improved collection and use of statistical information for any purpose within the Executive Branch.

### *Scope and Methodology*

Central to this study is a survey covering all Federal domestic assistance programs subject to the Federal Program Information Act, Public Law 95-220, which requires each agency to furnish current information to OMB for publication in its *Catalog*. This listing is the universe from which a second list of programs using statistical data for allocating benefits will be developed. In addition, OMB's *Catalog* provides names of contacts, dollars obligated, and types of assistance on an updated basis.

OFSPS will also draw upon studies conducted by the Advisory Commission on Intergovernmental Relations (ACIR), the Congressional Research Service (CRS), and the Center for Governmental Research, Inc. While each of these studies had somewhat different objectives, all identified a subset of the programs that OFSPS will catalog. It should be noted that differences in objectives in the studies account for differences in findings—specifically, dollars distributed on the basis of statistical data. A brief description of these three studies along with their relationship to the OFSPS effort follows.

ACIR's thorough and massive study of the complex system of categorical grants-in-aid to State and local governments included findings on the use of statistical factors and degree of satisfaction with formula grants.[2] In addition to the perspective this study brings regarding the political aspects of statistically driven allocations, ACIR's work contributes to the OFSPS effort through its identification of programs having both "formula" and "project" characteristics.

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[1] This authority was delegated to the Secretary of Commerce under Executive Order No. 12013, effective October 9, 1977. The Office of Federal Statistical Policy and Standards was established to carry out these functions.

[2] Note that *grants* refers to only one type of domestic assistance. ACIR's study did not cover direct payments and guaranteed loans, for example.

This means that competition for project grant funds is constrained by a formula that may determine how much money is available to applicants within a State. These programs do not meet OMB's definition of formula grants which requires that funds be used for "activities of a continuing nature *not confined to a specific project.*"

Since agencies must supply *Catalog* information using OMB's definitions, it would be, in most cases, virtually impossible to determine if a program used data in the allocation process without a close examination of the laws and regulations for each of 1000 programs. ACIR has completed much of this work and its findings will be incorporated in the study underway by OFSPS.

In 1978, the Congressional Research Service examined the use of population data in Federal assistance programs and added to those programs already identified by ACIR. Two examples are: Comprehensive Public Health Services, considered a block grant by ACIR, and thus not listed in its Catalog of categoricals; and State Underground Water Source Protection classified as a project grant by ACIR but which nevertheless bases allocations to States on populations and other statistical factors. Combining the listings of CRS and ACIR and the information contained in OMB's *Catalog* was the first step in the OFSPS study. The second step was to develop a crosswalk of terminology to make the ACIR, CRS and OMB definitions consistent.

New materials on statistically based allocations were developed by the Center for Governmental Research, Inc., in 1979 with support from the National Science Foundation. The Center published an analysis of 147 Federal grant-in-aid formulas. The results of this study, include an extensive dictionary of formula elements, the specification of formula equations, and various catalogs and cross-classifications that vividly demonstrate the complexity of the use of statistical data in allocating aid. OFSPS will ask program administrators to update and verify this information before incorporating the classification and dictionary elements developed by the Center.

Finally, through personal interviews, OFSPS will obtain similar information for programs not covered by those earlier efforts. New information to be developed will include: sources of data, methods of verification and update, modifications to data, use of data processing, problems associated with statistical allocations, ease of data acquisition, and program obligations. The analysis will consist of a series of tabular presentations and descriptive statistics, where appropriate. The OFSPS effort is scheduled for completion in August 1980.

# *Policy Analysis With Social Security Research Files*

By Wendy Alvey
*Social Security Administration,*
*Department of Health, Education, and Welfare*

In March of 1978, the Social Security Administration (SSA) sponsored a Workshop on Policy Analysis with Social Security Research Files. The *Proceedings* (1) from that conference are the occasion for this paper. The 792-page volume, published by Social Security's Office of Research and Statistics (ORS), contains virtually all of the 42 papers presented at these meetings in their unabridged form. The Appendix provides the titles and authors of the papers grouped by data source. This article will attempt to describe the kinds of data upon which the presentations for these meetings were based.

## *User-Producer Workshop*

The Office of Research and Statistics has sponsored a number of user-producer workshops over the past decade. As in these earlier exchanges, the Continuous Work History Sample (CWHS) figured prominently at the March 1978 meetings. However, while the CWHS is the most widely used microdata file that the Social Security Administration prepares for policy research, there has been increasing interest in many other data sets now available to researchers outside SSA. Among these are the files from the following projects or surveys:

- Longitudinal Retirement History Study;
- CPS-IRS-SSA Exact Match Study;
- Surveys of supplemental security income beneficiaries; and
- Surveys of disabled beneficiaries.

Because of this interest, ORS decided to sponsor a workshop that would cover the full range of SSA data bases now being used to research public policy questions.

The conference was held at the Hospitality House in Williamsburg, Virginia, on March 15-17, 1978. Statisticians, economists, analysts, and policymakers from all parts of the research community came to share their experiences regarding the use of these SSA data and the problems, limitations, and advantages they have encountered. About 35 percent of the participants were from the Social Security Administration. The others represented social scientists from other Federal Government agencies (27 percent) and the nongovernment sector (38 percent)—primarily colleges and universities. Several representatives from the Canadian research community participated, as well.

In order to maximize interaction among the participants, the workshop program consisted of several different types of sessions:

1. Invited paper sessions, in which formal discussions critiqued the papers;
2. Contributed paper sessions, in which unsolicited papers were presented;
3. Informal user workshops, in which session leaders opened the way to specific user questions about the data files; and
4. A panel discussion session on mortality, which was added to the program in response to the interest generated by this subject.

Each major SSA research data base was discussed, both formally and informally, within the context of two or more of these types of sessions. In addition to the sessions dealing with specific data systems, an invited paper was also given on privacy and confidentiality issues, as these affect SSA data used for public issues.

## *SSA Data Files*

In carrying out its various programs, Social Security maintains much information on individual earnings and benefits in its administrative record systems. It is from these and additional survey data that numerous statistical systems have been developed by the Office of Research and Statistics. Naturally, most of the information was initially compiled for administrative purposes, and the subsequent microdata files were developed primarily to support SSA policy research and analysis. Nevertheless, many of the resulting systems contain data of considerable potential value to researchers in many fields of study. Hence, several nonconfidential files have been made available, with varying restrictions, for such research.

The ORS pamphlet on *Research Microdata Files* (2) provides general information about these systems.

The papers presented at Williamsburg drew primarily on the four major data systems mentioned earlier: the Longitudinal Retirement History Study, the welfare and disability research files, the Continuous Work History Sample, and a combination of interagency survey and administrative information which comprises the Exact Match files. This section will briefly describe some of the uses of these files, particularly as they relate to the March 1978 Conference.

*The Longitudinal Retirement History Study (LRHS).*—These files contain information on current employment, plans for retirement, demographic characteristics, attitudes toward retirement, pension eligibility, health and health coverage, living expenses, and current and expected retirement income. More specific information on the study, itself, is provided in (3). As for the conference, Irelan and Finegar, in their paper on "Surveys Relating to Retirement and Survivorship," suggested that these data provide a valuable source of information for studies into the sociology of work, consumer behavior, marital dynamics, the sociology of education, health behavior, and comparative mortality. Quinn, for one, used the LRHS data to present some preliminary results regarding labor force and retirement status of the self-employed. Maddox, Fillenbaum, and George also used the same data base to examine possible alternatives to institutionalization of the aged.

*Welfare and Disability Research Files.*—Social Security maintains a number of welfare and disability research files for policy analysis. Data from these systems include demographic characteristics, items on current employment, information on knowledge of Government-sponsored programs, health insurance and medical care data, social security payment history, longitudinal information on agency determinations regarding benefit requests, and some earnings information. The data from these and other in-house files provide a source for studying the disabled with regard to health, income, work experience, and benefit status, as well as allowing for comparative research with the nondisabled. For further information on each of the major welfare and disability systems accessed by the authors, see (4-7). More specifically, in addition to the presentation of several descriptive papers on these files at the Williamsburg meetings, these data were also used to look at work-related injuries (Vroman, Burton) and to explore the effect of disability on earnings potential (Fechter and McManus).

*Continuous Work History Sample (CWHS) Files.*—The CWHS, perhaps the most widely used of SSA's data files, is a system of general multipurpose statistical files designed primarily for socioeconomic research. Longitudinal analysis is possible, using such variables as taxable wages, taxable self-employment earnings, benefit status, and insurance eligibility, as well as several employer-related items (like industry, geographic location, and coverage group) and employment pattern date (e.g., number and years of employment, quarters of social security coverage, etc.). Detailed documentation of the CWHS files is available in (8). The papers presented at Williamsburg, for the most part, drew on one or more of these systems. For instance, invited papers by Buckler-Smith and Cartwright provided descriptive information about the files, themselves. Other presentations based on the CWHS data included examination of trends in migration (Wardwell-Gilchrist, Morrison-McCarthy, and Jacobson), research into fluctuations in earnings over time (Schiller), some labor market analysis (Kleiner and Plantes), and exploration into possible uses of these systems for studying differentials by occupation and industry (Hirschberg). Of course, these papers represent only a sample of the kinds of research which have resulted from the CWHS in recent years.

*The CPS-IRS-SSA Exact Match Files.*—The Exact Match Study represents a joint interagency attempt to apply exact data linkage techniques in order to obtain improved statistical information for studies in income distribution and redistribution. As such, the resulting files contain demographic information, earnings and benefit data, and labor force and work experience items from the Census Bureau's Current Population Surveys; earnings-history data, benefit information, and demographic items from Social Security's administrative record systems; and selected income information from the Internal Revenue Service's file of individual income tax returns. These data provide a broad base for both cross-sectional and longitudinal analysis of a socioeconomic nature. Extensive documentation of the files, themselves, is available in (9). At Williamsburg, the Kilss-Scheuren paper presented a summary of the over-all study. Some other papers used the matched administrative and survey data to examine age and family income (Radner), projected rates of return to future retirees (Leimer), and the impact of alternative inflation adjustments on social security wealth (Feldstein and Pellechio). The use of these data for economic modelling was touched on by several other participants, as well.

## *Future Data Needs*

The March 1978 Workshop on Policy Analysis with Social Security Research Files concluded with a panel session on future data needs for Social Security research. The panel was chaired by John Carroll, Director of SSA's Office of Research and Statistics. The invited speakers were Jacob Feldman, of the National Center for Health Statistics; Larry Orr, Office of the Assistant Secretary for Planning and Evaluation, HEW; Nelson McClung, from the Treasury Department's Office of Tax Analysis; Nancy Ruggles, Assistant Director of the United Nations' Statistical Office; Richard Ruggles, from Yale University; and Dorothy Projector and Thomas Staples, who represented ORS.

The panelists expressed their appreciation for the variety and extent of important work currently underway at SSA. Then, with regard to future research, they emphasized the need for anticipating and meeting new challenges. Among the areas deserving particular consideration were mortality of SSA-covered workers, private health insurance, private pensions, health, and economic well-being of the aged. They also recommended the need for continued reassessment of some of the methodological techniques currently being employed at SSA. Among their remarks were suggestions for further explorations in the areas of statistical matching and behavioral analysis and expanded development of integrated microdata sets for statistical use.

A limited number of copies of *Policy Analysis with Social Security Research Files: Proceedings of a Workshop held March 1978 at Williamsburg, Virginia* (792 pp.) are available, upon request, by writing to:

Robert Robinson
ORS Publications Staff, Room 1120
Social Security Administration
1875 Connecticut Ave., N.W.
Washington, D.C. 20009

## *References*


(1) Office of Research and Statistics, *Policy Analysis with Social Security Research Files: Proceedings of a Workshop Held March 1978 at Williamsburg, Virginia*, Social Security Administration, Research Report No. 52, 1979.

(2) Office of Research and Statistics, *Research Microdata Files: Fall 1978 Supplement to Research Publications Catalogue*, Social Security Administration, November 1978.

(3) Irelan, L.M., et al, *Almost 65: Baseline Data from the Retirement History Study*, Social Security Administration, Research Report No. 49, 1976.

(4) Allan, K., "First Findings of the 1972 Survey of the Disabled: General Characteristics," *Social Security Bulletin*, vol. 39, no. 10, pp. 18-37, October 1976.

(5) Office of Research and Statistics, *Users' Manual for the Longitudinal Sample of Disability Insurance Applicants*, Social Security Administration, No. 19, November 1977.

(6) Office of Research and Statistics, *Continuous Disability History Sample Restricted Use Data File: Description and Documentation*, Social Security Administration, No. 24, January 1978.

(7) Tissue, T., "The Survey of Low-Income Aged and Disabled: An Introduction," *Social Security Bulletin*, vol. 40, no. 2, pp. 3-11, February 1977.

(8) Bureau of Economic Analysis, *Regional Work Force Characteristics and Migration Data: A Handbook on the Social Security Administration's Continuous Work History Sample*, U.S. Department of Commerce, 1977.

(9) See the Office of Research and Statistics series, *Studies from Interagency Data Linkages*, Social Security Administration. In particular, see Report No. 8, "1973 Current Population Survey—Administrative Record Exact Match File Codebook, Part I—Code Counts and Item Definitions," by Faye Aziz, Beth Kilss, and Frederick Scheuren.


## *Appendix*

PAPERS PRESENTED AT THE WORKSHOP ON POLICY ANALYSIS WITH SOCIAL SECURITY RESEARCH FILES

### *1. Social Security Research Files: The Potential For Studies In Public Policy*

Invited Paper Session I

Access to Social Security Microdata Files for Research and Statistical Purposes: An Overview, by Lois Alexander and Thomas Jabine.

Surveys Relating to Retirement and Survivorship, by Lola Irelan and Wayne Finegar.

Discussion by Margaret Martin.

Extending the Uses of the LRHS Data Set, by George Maddox, Gerda Fillenbaum,and Linda George.

Labor Force and Retirement Status of the Self-Employed: A Preliminary View From the 1969 Retirement History Study, by Joseph Quinn.

Discussion by Lawrence Haber.

*2. Social Security Health and Disability Research*

Contributed Paper Session I

Aggregate Medicare Enrollment by Age, Sex, and Race as a Resource in Analyzing Demographic Change in Local Areas, by Richard Irwin.

SSA Public-Use Data Files for Disability Research, by Aaron Krute, Barry Bye, and Audrey Coe.

Serious Work Injuries: Examining Some Consequences, by Wayne Vroman.

The Impact of Work-Related Injuries on Wisconsin Workers, by John Burton.

*3. The CPS-IRS-SSA Exact Match Study Samples*

Invited Paper Session II

The 1973 CPS-IRS-SSA Exact Match Study: Past, Present, and Future, by Beth Kilss and Fritz Scheuren, with Faye Aziz and Linda DelBene.

Age and Family Income, by Daniel Radner.

Discussion by Edward Budd.

Projected Rates of Return to Future Social Security Retirees Under Alternative Benefit Structures, by Dean Leimer.

Social Security Coverage of Government Workers, by Gary Hendricks and Elizabeth Peters.

Discussion by James Schultz.

*4. Some CWHS Research*

Contributed Paper Session II

An Intercohort Analysis of Lifetime Earnings: The Role of Cyclical Fluctuations in Labor Demand and Labor Supply Composition Changes, by Mary Kay Plantes.

External Validation of Migration Findings From the Continuous Work History Sample, by John Wardwell and C. Jack Gilchrist.

The SSI Data and Statistical System, by Jack Schmulowitz.

The Use of the CWHS for Labor Market Information: A Comparative Analysis, by Morris Kleiner.

Relative Earnings Mobility in the United States, by Bradley Schiller.

*5. Social Security Disability Research Files*

Invited Paper Session III

Health Conditions and Earnings Capacity: A Human Capital Model, by Alan Fechter.

The Search for a Health Variable, by Monroe Berkowitz.

The Survey of Low-Income Aged and Disabled: Survey Design and Data System, by Erma Barron.

Functional Limitations and Job Requirements: Effects on Labor Force Choices, by Jesse Levy and Leo McManus.

Discussion by William Johnson.

*6. More CWHS and Related Research*

Contributed Paper Session III

Social Security, Health, and Retirement Plans, by Arden Hall and Terry Johnson.

Treatment of Short-Service Workers Under OASDI Retirement Provisions, by Herman Grundmann.

Obtaining Occupational Data for the Continuous Work History Sample: Issues to be Explored, by David Hirschberg.

Reduced Form Versus Structural Equations of the Growth in Earnings of MDTA Enrollees, by William Bowman.

GRASP: A Rapid Access to the Continuous Work History Sample, by C. Jack Gilchrist and John Wardwell.

*7. The Continuous Work History Sample*

Invited Paper Session IV

The Continuous Work History Sample: Description and Contents, by Warren Buckler and Creston Smith.

Major Limitations of CWHS Files and Prospects for Improvement, by David Cartwright.

Discussion by Richard Taeuber.

Worker Displacement in the Steel Industry, by Louis Jacobson.

Post-1970 Demographic Change in Nonmetropolitan Areas: Insights from the 10-Percent CWHS, by Kevin McCarthy and Peter Morrison.

Discussion by Larry Long.

*8. More Exact Match Research*

Contributed Paper Session IV

An Abstract Data Structure Approach to the CPS Household, by Alan Freiden and Thomas Knoblauch.

Social Security Wealth: The Impact of Alternative Inflation Adjustments, by Martin Feldstein and Anthony Pellechio.

An Economic Model of Early Social Security Acceptance, by Richard Burkhauser.

Estimating the Failure Rate of a Unique Identifier Match Procedure Using Social Security Numbers, by Peter Cook.

Using System Dynamics to Model the Social Security System, by Lawrence Marsh and Meredith Scovill.

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Note: Summaries of panelists remarks are also included in the *Proceedings*. No papers, however, were available from the User-Producer Workshops and the ad hoc session on Mortality Research which also were part of the Conference program.

# CURRENT DEVELOPMENTS

## CENSUS RELEASES LATEST POPULATION ESTIMATES FOR U.S., STATES, AND COUNTIES

The Bureau of the Census has recently published a series of reports showing population estimates for the United States, States, the outlying areas, metropolitan areas, and counties. Except for the monthly update of the national population totals, these estimates will be the last to be published prior to the release of preliminary 1980 census counts.

The report "Estimates of the Population of the United States, by Age, Race, and Sex: 1976 to 1979," shows annual detail at the national level by single years of age for the resident and civilian population and for the population including the overseas Armed Forces. A discussion of the changes in age structure focuses on growth in the young adult and elderly population. A table brings estimates of the components of population change up to date through 1979.

Two reports present fully revised State population estimates for the complete 1970 decade. "Annual Estimates of the Population of States: July 1, 1970 to 1979" offers estimates of the resident and civilian population together with estimates of the components of population change for the resident and civilian populations, 1970 to 1979, and resident components of change for the periods 1970 to 1975 and 1975 to 1979. A discussion of growth trends highlights differential population change during the two periods. An illustrative apportionment indicates what States would gain or lose Congressional seats if these estimates were used to reapportion Congress. Complementing this report is "Estimates of the Population of States, by Age: July 1, 1971 to 1979," which shows annual estimates of the resident population for 5 broad age groups and cumulates data for the ages 14 and over, 18 and over, and 21 and over. Tables also show percent change in the population in each age group, 1970 to 1979, and a percent distribution in each State of the population in each age group, 1970 and 1979.

"Estimates of the Population of Puerto Rico and the Outlying Areas: 1970 to 1978" presents annual estimates for Puerto Rico, the Virgin Islands, American Samoa, Guam, the Trust Territory of the Pacific Islands, and the Commonwealth of the Northern Mariannas. Also shown are components of change in the resident and civilian populations of these areas, 1970 to 1978. These estimates represent a considerable revision over estimates published earlier by the Bureau for several of these areas due to changes in methodology or data input.

"Estimates of the Population of Counties and Metropolitan Areas: July 1, 1977 and 1978" is a consolidation of estimates for all counties and metropolitan areas published earlier by the Bureau in individual State reports. All tables, however, contain components of population change for 1970 to 1978, unlike the earlier reports. The report contains an alphabetical table of estimates for SMSA's and component counties and for standard consolidated statistical areas and compound SMSA's. Tables show rank of metropolitan complexes of 1 million or more and rank of SMSA's by population. Summary tables present population by size of SMSA and population by State by metropolitan and nonmetropolitan status.

Copies of these reports may be purchased from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402, or from Department of Commerce Field Office. Cost of the reports, all of which are published in *Current Population Reports*, Series P-25, is as follows:

| *Report* | *No.* | *Pages* | *Cost* |
|---|---|---|---|
| U.S. by age, race, sex | 870 | 30 | $1.75 |
| States, total population | 876 | 14 | 1.25 |
| States, age | 875 | 14 | 1.00 |
| Outlying areas | 872 | 7 | .75 |
| Counties, SMSA's | 873 | 98 | 4.00 |

(DONALD E. STARSINIC, BUREAU OF THE CENSUS, DEPARTMENT OF COMMERCE, telephone (301) 763-5072)

## NEW BLS DATA RELATE WORKERS' EARNINGS TO THE FAMILIES IN WHICH THEY LIVE

The Bureau of Labor Statistics (BLS) recently published the first of a new series of quarterly press releases on the combined weekly earnings of all wage and salary workers in a family as well as the weekly earnings of individuals within the family. The new series is based on a survey of households (the Current Population Survey), concluded for BLS by the Bureau of the Census.

The initial release presents information on the usual weekly earnings of families by type of family, the number of earners, and their relationship. Figures are shown also for families which contain both wage and salary earners and unemployed persons. Earnings information for individual wage and salary workers who usually work full time is shown by sex, age, family status, race, Hispanic origin, and major occupational group. Information on part-time workers also is presented. The first release presents annual average and quarterly data for 1979. Subsequent releases will include information for the current quarter and the same quarter of the previous year.

These new series on the earnings of families and individuals replace a more limited series on the earnings of individuals only. Data from the old series are not strictly comparable because of improvements in the CPS questionnaire and editing procedures, as well as the establishment of an allocation process to handle non-responses, and the exclusion of incorporated self-employed workers from the wage and salary universe. In addition, the new series is based on a monthly collection of information from one-fourth of the CPS sample rather than the once-a-year collection in May from the full sample. The averaging of the monthly data into quarterly series provides a level of reliability almost as high as that from the previous May series, while the annual average data are more reliable.

For copies of the initial release (USDL 80-188) "New Data Relate Workers' Earnings to the Families in Which They Live" or to be placed on the mailing list for future releases on the quarterly earnings—family employment series, contact the U.S. Bureau of Labor Statistics, Office of Publications, 441 G Street, N.W., Washington, D.C. 20212, telephone (202) 523-1221. For additional information on the earnings of individuals or for copies of a technical note explaining the new series, contact Earl Mellor, telephone (202) 523-1821. For information on the family data, contact Howard Hayghe (202) 523-1959. (EARL MELLOR, BUREAU OF LABOR STATISTICS, DEPARTMENT OF LABOR, telephone (202) 523-1821)

## CONFERENCE REPORT ON WOMEN'S DATA NEEDS

The Census Bureau has recently released a report which contains the research papers presented at a conference sponsored by the Census Bureau on "Issues in Federal Statistical Needs Relating to Women," held April 27-28, 1978, in Bethesda, Maryland. The papers were revised subsequent to the conference to reflect the authors' responses to comments and discussion by conference participants. The 2-day conference brought together data users and data producers to evaluate existing data pertaining to women and to propose new types of data which would reflect the changing patterns in the status of women and related societal changes. Responses to recommendations and issues raised at the conference are also provided from the Federal statistical agencies of the Bureau of the Census, the Bureau of Labor Statistics, and the National Center for Education Statistics.

Conference discussion of the needs and shortcomings in data collection efforts relating to women focused on the topics of income, occupation, household structure, education, health, discrimination, and public policy. Among the major trends in the areas discussed were the increase in one-person households, particularly among the young; the shifting composition of family units over time; the growth in multiearner families; and the increase of women acting as the only breadwinner in a family with dependents. As noted at the conference, the far-reaching social change in women's roles engendered by these and other developments makes inappropriate the former stereotypic assumptions underlying paradigms in research and calls for a thorough re-evaluation of the way in which data relating to American women have been collected, analyzed, and made available. Finally, the conference participants emphasized that the needs for a revised conceptual framework and for improvement and expansion in the data base for women extend across all surveys and analyses conducted by organizations in both the public and private sectors.

Copies of the report, "Census Bureau Conference on Issues in Federal Statistical Needs Relating to Women," *Current Population Reports*, Series P-23, No. 83

(152 pages, $4.75), may be obtained from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402. (KAREN M. MILLS, BUREAU OF THE CENSUS, DEPARTMENT OF COMMERCE, telephone (301) 763-7962)

## REPORT ON BLACK COLLEGES

This report recently issued by the National Center for Education Statistics provides information on the Nation's 105 Traditionally Black Institutions (TBI's). TBI's are defined as those institutions which were founded for the purpose of educating blacks. All but three of the 105 institutions still enroll predominantly blacks.

TBI's accounted for almost one fourth of all degrees awarded to blacks in 1976. They accounted for 4 percent of all associate degrees, 38 percent of all bachelor's degrees, 22 percent of all master's degrees, 4 percent of all doctoral degrees, and 20 percent of all first professional degrees awarded to blacks.

The Directory portion of the report lists all 105 institutions and for each presents the following items of information: city and State in which located, year established, control (public vs. private), level (2-year or 4-year), enrollment data (including percent black, percent in-State, and number of full-time students) number of faculty, number of degrees awarded at each level, physical facilities (in square feet), number of titles in library, current funds revenues (including total, and that derived from tuition and fees, government sources, and endowment), current funds expenditures (including total, and that allocated to instruction, research, and scholarships).

The data on which this report is based were collected through the Higher Education General Information Survey (HEGIS) which is conducted annually by NCES.

Single copies of the document entitled *Traditionally Black Institutions: A Profile and an Institutional Directory*, NCES 79-361, can be obtained free upon request from the Statistical Information Office, National Center for Education Statistics, 400 Maryland Avenue, S.W., Washington, D.C. 20202. (O. JEAN BRANDES, NATIONAL CENTER FOR EDUCATION STATISTICS, DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE, telephone (202) 472-5026)

## NONRESIDENT ALIEN STUDENTS IN THE U.S.

A recently released bulletin of the National Center for Education Statistics sheds light on the attempt of American institutions of higher education to attract nonresident aliens to offset the declines in enrollment projected for the 1980's. Data collected in recent years by NCES through its Higher Education General Information Survey are presented in eight tables.

The main findings include the following:

—The enrollment of nonresident aliens rose by 15 percent between 1976 and 1978, reaching a total of over 253,000.

—The role of nonresident alien students, predominently males, was disproportionately high at the graduate level, both in terms of enrollments and degrees received.

—They were the recipients of over 11 percent of all doctor's degree awarded in the United States. Almost half of these degrees were in the fields of engineering, the physical sciences and the social sciences, in that order.

—Well over half of the master's degrees received by nonresident aliens were in the fields of business and management, engineering, and education, in that order.

—Engineering as well as business and management each contributed more than one-fourth of the bachelor's degrees, followed by the social sciences with 10 percent.

—More than one-third of the foreign students were enrolled in institutions in California, Texas and New York, in that order.

Single copies of the bulletin entitled, *Nonresident Alien Enrollments and Degrees Are Increasing* (NCES 80-B06), may be obtained from the Statistical Information Office, National Center for Education Statistics, 400 Maryland Avenue, S.W., Washington, D.C. 20202. (O. JEAN BRANDES, NATIONAL CENTER FOR EDUCATION STATISTICS, DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE, telephone (202) 472-5026)

## GOVERNMENT-OWNED FIXED CAPITAL IN THE UNITED STATES, 1925-79

Estimates of the value of government-owned fixed capital were published for the first time by the Bureau of Economic Analysis in the March 1980 issue of the *Survey of Current Business*. Annual estimates of gross and net stocks in current dollars and constant (1972) dollars are available for the total of all governments, the Federal Government (including and excluding military), and State and local governments. Stock estimates are also available for government enterprises.

An analysis of the growth and composition of the stocks and a brief statement of methodology are also included in the March *Survey*. (JOHN C. MUSGRAVE, BUREAU OF ECONOMIC ANALYSIS, DEPARTMENT OF COMMERCE, 523-0837)

## RECENT ENERGY REPORTS

The Energy Information Administration, U.S. Department of Energy has recently announced the following new publications which are briefly described.

*Performance Profiles of Major Energy Producers*, 1977 (DOE/EIA-0206 (77); GPO Stock Number 061-003-00092-4; $3.75).—This publication assesses the impacts of major Federal Government programs directed at encouraging more efficient use of energy. This is one of a series of reports in EIA's Energy Policy Study, which examines Government intervention into energy markets.

*Research into the Methodology of the Leap Model* (DOE/EIA-451887).—This report summarizes the research carried out in the analysis of the Long-Term Energy Analysis Package (LEAP) model and its underlying methodology. LEAP describes the overall energy system of the United States from the base year to 2025 by 5-year intervals.

*Residential Energy Consumption Survey: Characteristics of the Housing Stock and Households* (DOE/EIA-0207/2; GPO Stock Number 061-003-00093-2; $4.25).—This report contains tables describing the households and the housing units which were selected for the National Interim Energy Consumption Survey (NIECS).

*Residential Energy Consumption Survey: Conservation* (DOE/EIA-0207/3; GPO Stock Number 061-003-00087-8; $6.00).—This report presents statistics on the conservation activities performed by households between January 1977 and December 1978 and the status of the households with respect to insulation, storm windows, and other energy-conserving characteristics.

*Short-Term Integration Forecasting System (STIFS) Forecast Validation Procedure* (DOE/EIA-0183/17) — This publication contains a description of the Short-Term Integration Forecasting System (STIFS), the system structure, data, the procedures that will be used to validate the accuracy of the forecasts. STIFS is a computerized data base and forecasting module integrating system that generates monthly national forecasts of approximately 114 energy variables for a period of from 12 to 36 months.

*Solar Collector Manufacturing Activity. July Through December 1979* (DOE/EIA-0174(79/2); GPO Stock Number 061-003-00095-9; $3.25).—This is a report on the results of a survey of private firms which manufacture and sell solar collectors to the residential market.

*State Energy Data Report. Statistical Tables and Technical Documentation. 1960 Through 1978* (DOE/EIA-0214(78); GPO Stock Number 061-003-00096-7; $10.00).—This report provides energy consumption annually for 1960 through 1978 by State, by fuel, type, and major end use sector.

*Trends in the Capacity Utilization and Fuel Consumption of Electric Utility Power Plants in 1970-1978* (DOE/EIA-0184; GPO Stock Number 061-003-00091-6; $5.00).—This examines recent trends in the capacity utilization and fuel consumption of electric utility power plants. (JOHN E. DANIELS, OFFICE OF ENERGY INFORMATION SERVICES, ENERGY INFORMATION ADMINISTRATION, U.S. DEPARTMENT OF ENERGY, telephone (202) 634-5602)

## HEALTH CHARACTERISTICS OF VETERANS AND NONVETERANS

The Reports and Statistics Service, Veterans Administration, recently released a publication entitled *Health Characteristics of Veterans and Nonveterans, Executive Summary*. This report presents data from the Health Interview Survey, 1971-1974. Veterans and nonveterans are compared with respect to health characteristics such as work-loss days, physician visits and average rate of hospital discharges. Data are also presented, for veterans only, on the relative use of VA versus non-VA hospitals, including length of hospital episode.

Copies of the report may be obtained from Virginia Seiling, Biometrics Division (042A2), Reports and Statistics Service, Veterans Administration, 810 Vermont Avenue, N.W., Washington, D.C. 20420, telephone (202) 389-3846. (HOWARD J. SHARON, REPORTS AND STATISTICS, VETERANS ADMINISTRATION, telephone (202) 389-2423)

## VA HOSPITAL PATIENTS WITH ARTHRITIC CONDITIONS

The Reports and Statistics Service, Veterans Administration, has released a publication entitled

*Hospital Patients with Arthritic Conditions: 1978 Veterans Administration Hospital Patient Census.*

This report describes the characteristics of a sample of hospitalized arthritic patients in VA hospitals on October 4, 1978. The report presents prevalence figures for arthritis in VA hospital patients, and the demographic characteristics of the arthritic patients. Further data are presented on the types of arthritis, number of arthritic conditions, location of arthritic condition, medical prognosis, and ability to perform activities of daily living.

Copies of the report may be obtained from Amy Kuntz, Biometrics Division (042A2), Reports and Statistics Service, Veterans Administration, 810 Vermont Avenue, N.W., Washington, D.C. 20420 telephone (202) 389-3368. (HOWARD J. SHARON, REPORTS AND STATISTICS SERVICE, VETERANS ADMINISTRATION, telephone (202) 389-2423)

## SCIENCE EDUCATION DATABOOK

The National Science Foundation recently announced the publication of the *Science Education Databook* (SE 80-3), a compendium of quantitative information portraying science (including natural science, mathematics, engineering, and social science) education in the United States.

The 156-page volume contains entries assembled in six chapters: Resources; Participation; Attitudes, Goals, and Needs; Test Data; Degree Data; and Employment in Science and Engineering. With a few exceptions, each entry consists of a chart and corresponding table. Included also is an annotated bibliography describing the sources from which the entries were assembled. a brief remark accompanies each entry as an example of one of many possible observations that could be made. This volume will be of interest to those working in science education and to government decisionmakers.

Copies may be obtained from the Forms and Publications Unit, National Science Foundation, 1800 G Street, N.W., Washington, D.C. 20550. (CHARLES E. FALK, DIVISION OF SCIENCE RESOURCES STUDIES, NATIONAL SCIENCE FOUNDATION, telephone (202) 634-4634)

## RECENT SOCIAL SECURITY REPORTS

The Office of Research and Statistics in the Social Security Administration recently issued the following *Social Security Bulletin* reports and staff papers which are briefly described.

*Demographic and Economic Characteristics of Nonbeneficiary Widows: An Overview (Social Security Bulletin,* November 1979).—This article analyzes the characteristics of widows under age 60 without dependent children and who were ineligible for monthly social security benefits. The data source is a Social Security Administration mail survey of 3,000 women widowed in 1977. Three-fourths received a lump sum from a life insurance policy. Their overall annual median income was $6,144. One-fourth (and almost half of those not working) had incomes below the poverty level. Poverty was associated with labor-force status rather than with age, earnings were the most important source of income. Work before the husband's death was strongly associated with current employment. Pension benefits, based on the husband's work, ranked far behind earnings as an "income source," but increased in significance with the age of the widow.

*Subjective Retirement (Social Security Bulletin,* November 1979).—An individual's identification of his retirement situation does not always coincide with retirement as defined by objective measures. This article continues the analysis of data provided by the Retirement History Study to discover how subjective assessments matched objective measures. For those completely retired or not retired, self-evaluation was closely related to the number of hours worked. A "partly retired" response was not as well-predicted, in part because of definitional problems. Pension receipt and aging had some significance. Analysis of the partly retired suggests the extent of gradual retirement during the period 1969-75.

*Disability Claimants Who Contest Denials and Win Reversals Through Hearings* (Staff Paper No. 34, SSA Publication No. 13-11864).—This staff paper examines the characteristics of workers who have appealed denied claims for disability insurance benefits. The author reviews the entire appeals process and points out that, although two-thirds of all disability claims are initially denied, half of those contested through the appeals process result in reversals of the initial decision. The paper shows that claimants who were represented by an attorney won reversals more often than those who were not. Claimants who were black, who had low earnings, or who had little recent employment were denied slightly more often at initial, reconsideration, and hearing levels. Data for the study were obtained from program records of disability decisions in 1970 and 1975.

*The Role of the Replacement Rate in the Design of the Social Security Benefit Structure* (Staff Paper No. 36, SSA Publication No. 13-11866).—This staff paper examines ways in which the pattern of replacement rates can be controlled over time. This paper attempts to clarify some issues surrounding how the replacement rate functions as an adequate measure of retirement income (such as social security) relative to preretirement earnings and how this role is reflected in the way benefits are computed. The author suggests a framework for analyzing the equity implications of tax or benefit structures over time and applies this framework to the present law benefit structure and another structure (the Hsiao Panel proposal) that has been considered by Congress.

Reprints of the above materials are available from the Publications Staff, Office of Research and Statistics, Social Security Administration, 1875 Connecticut Avenue, N.W., Washington, D.C. 20009, telephone (202) 673-5209. The *Social Security Bulletin* is available by subscription, at $14 a year through the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402. (ROBERT E. ROBINSON, SOCIAL SECURITY ADMINISTRATION, DEPARTMENT OF HEALTH, EDUCATION, AND WELFARE, telephone (202) 673-5576)

## PUBLIC HEALTH CONFERENCE ON RECORDS AND STATISTICS

public health conference on records and statistics...

The 18th National Meeting of the Public Health Conference on Records and Statistics, will be held August 4-6, 1980, at the Capital Hilton Hotel, in Washington, D.C. Sponsored by the National Center for Health Statistics, the Conference session topics include: new uses of traditional records; prevention, emphasizing both environment and health promotion; health care technology assessment; and a discussion of the 1980 Census.

For more information, contact Conference Management Branch, National Center for Health Statistics, Room 2-12, Center Building, 3700 East-West Highway, Hyattsville, Maryland 20782, telephone (301) 436-7122.

# PERSONNEL NOTES

FEDERAL RESERVE BOARD

*Division of Research and Statistics*: RONALD ROST, Ph.D. from Northwestern, has joined the Board's staff as an Economist in the Business Conditions Section.

KENNETH KOPECKY, Economist in the Econometric and Computer Applications Section, has been promoted to Senior Economist in that Section.

## Retirements

DEPARTMENT OF LABOR

*Bureau of Labor Statistics*: Retiring from the Bureau on February 29, 1980, were the following:

DUDLEY E. YOUNG, Assistant Commissioner, Employment Structure and Trends, after 42 years of service with the Federal Government. He was responsible for the Bureau's Federal/State cooperative employment survey programs. Thomas J. Plewes has been designated Acting Assistant Commissioner of Employment Structure and Trends.

RUDOLPH C. MENDELSSOHN, Assistant Commissioner, Systems and Standards, after 40 years of service with the Bureau of Labor Statistics. He was responsible for the Bureau's computer systems development program. Steven R. Roman has been designated Acting Assistant Commissioner of Systems and Standards.

# SCHEDULE OF RELEASE DATES FOR PRINCIPAL FEDERAL ECONOMIC INDICATORS

*June 1980*

Release dates scheduled by agencies responsible for the principle economic indicators of the Federal Government are given below. *These are target dates* that will be met in the majority of cases. *Occasionally agencies may be able to release data a day or so earlier or may be forced by unavoidable compilation problems to release a report one or more days later.* In certain cases,* timing variability in the receipt of raw data requires a range of dates rather than a specific release date.

A similar schedule will be shown here each month covering release dates for the following month. The indicators are identified by the title of the releases in which they are included; the source agency; and the release identification number where applicable. Release date information for additional series can be found in publications of the sponsoring agencies.

(Any inquiries about these series should be directed to the issuing agency.)

| *Date* | | *Subject* | *Data for* |
|---|---|---|---|
| June | 2 | Construction Expenditures (Press release), Census,C-30 | April |
| | 2 | Manufacturers' Shipments, Inventories, and Orders, Census, M3-1 | April |
| | 3 | Selected Interest Rates, Federal Reserve Board (FRB), G.13 (415) | May |
| | *5-6 | Consumer Instalment Credit, FRB, G.19 (421) | April |
| | 6 | The Employment Situation (Press release), Bureau of Labor Statistics (BLS) | May |
| | 6 | Producer Price Indexes (Press release), BLS | May |
| | 6 | Monthly Wholesale Trade (Press release), Census, BW | April |
| | 6 | Manufacturers' Export Sales and Orders, Census, M4-A | April |
| | 6 | Factors Affecting Bank Reserves and Condition Statement of Federal Reserve Banks, FRB, H.4.1 (503) | Week Ending June 4 |
| | 6 | Weekly Consolidated Condition Report of Large Commercial Banks and Domestic Subsidiaries, FRB, H.4.2 (504) | Week Ending May 28 |
| | 6 | Money Stock Measures, FRB, H.6 (508) | Week Ending May 28 |
| | 9 | Sales, Inventories of Single-Family Homes, Census, C-25 | April |

| *Date* | | *Subject* | *Data for* |
|---|---|---|---|
| June | 10 | Advance Monthly Retail Sales (Press release), Census (54) | May |
| | 10 | Quarterly Financial Report for Manufacturing Corporations, Federal Trade Commission | 1 Q'80 |
| | 10 | Plant and Equipment Expenditures, Bureau of Economic Analysis (BEA) | 1 Q'80 |
| | 11 | Manufacturing and Trade: Inventories and Sales, Census | April |
| | 11 | Crop Production, Agriculture | June 1 |
| | 13 | Factors Affecting Bank Reserves and Condition Statement of Federal Reserve Banks, FRB,H.4.1 (503) | Week Ending June 11 |
| | 13 | Weekly Consolidated Condition Report of Large Commercial Banks and Domestic Subsidiaries, FRB, H.4.2 (504) | Week Ending June 4 |
| | 13 | Money Stock Measures, FRB, H.6 (508) | Week Ending June 4 |
| | 16 | Yields on FHA Insured New Home 30-year Mortgages, HUD | June 1 |
| | *13-17 | Industrial Production, FRB, G.12.3 (414) | May |
| | *16-18 | Capacity Utilization: Manufacturing and Materials, FRB, G.3 (402) | May |
| | 17 | Housing Starts (Press release), Census, C-20 | May |
| | 17 | Personal Income and Outlays, BEA | May |
| | 18 | Gross National Product (Second Revision), BEA | 1 Q'80 |
| | 18 | Corporate Profits (Revised), BEA | 1 Q'80 |
| | 19 | Summary of U.S. International Transactions, BEA | 1 Q'80 |
| | 20 | Factors Affecting Bank Reserves and Condition Statement of Federal Reserve Banks, FRB, H.4.1 (503) | Week Ending June 18 |
| | 20 | Weekly Consolidated Condition Report of Large Commercial Banks and Domestic Subsidiaries, FRB, H.4.2 (504) | Week Ending June 11 |
| | 20 | Money Stock Measures FRB, H.6 (508) | Week Ending June 11 |
| | 20 | Manufacturing Capacity Utilization, BEA | March |
| | 20 | Hogs and Pigs, Agriculture | June 1 |
| | 20 | Advance Report on Durable Goods, Manufacturers' Shipments and Orders (Press release), Census, M3-1 | May |
| | 23 | Supply-Demand Estimates Agriculture | Current Marketing Season |
| | 24 | Consumer Price Index (Press release), BLS | May |
| | 24 | Real Earnings, BLS | May |

| Date | | Subject | Data for |
|---|---|---|---|
| June | 24 | Treasury Statement (the monthly "budget"), Treasury | May |
| | 27 | Export and Import Merchandise Trade, Census, FT-900 | May |
| | 27 | Factors Affecting Bank Reserves and Condition Statement of Federal Reserve Banks, FRB, H.4.1 (503) | Week Ending June 25 |
| | 27 | Weekly Consolidated Condition Report of Large Commercial Banks and Domestic Subsidiaries, FRB, H.4.2 (504) | Week Ending June 18 |
| | 27 | Money Stock Measures, FRB, H.6 (508) | Week Ending June 18 |
| | 30 | Work Stoppages (Press release), BLS | May |
| | 30 | Labor Turnover In Manufacturing (Press release), BLS | May |
| | 30 | Agricultural Prices, Agriculture | Mid-June |
| | 30 | Composite Indexes of Leading, Coincident, and Lagging Indicators (Press release), BEA | May |

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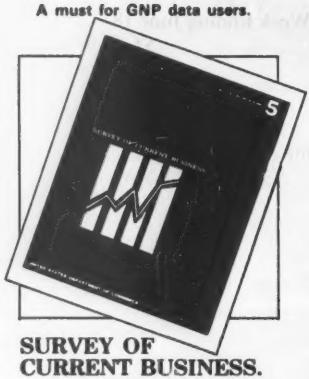

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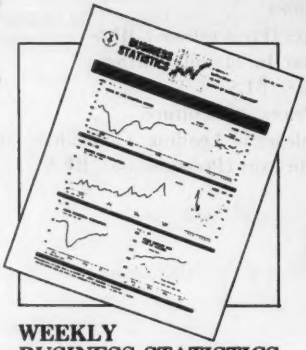

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# 24 Hour CPI Mailgram Service

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CONSUMER PRICE INDEX FOR ALL URBAN CONSUMERS (CPI-U): U.S. CITY AVERAGE (1967=100)

| GROUP | UNADJ INDEX MAY 1979 | UNADJUSTED PER CHG FROM 12 MO AGO | UNADJUSTED PER CHG FROM 1 MO AGO | S ADJ PER CHG FROM 1 MO AGO |
|---|---|---|---|---|
| ALL ITEMS | 214.1 | 10.8 | 1.2 | 1.1 |
| ALL ITEMS(1957-59=100) | 249.0 | - | - | - |
| FOOD AND BEVERAGES | 228.2 | 11.2 | .8 | .7 |
| FOOD | 234.3 | 11.4 | .9 | .7 |
| FOOD AT HOME | 233.4 | 11.3 | .7 | .5 |
| CEREALS AND BAKERY PRODUCTS | 216.2 | 9.5 | .8 | 1.0 |
| MEATS, POULTRY, FISH, AND EGGS | 242.2 | 19.4 | .9 | .1 |
| DAIRY PRODUCTS | 203.8 | 11.1 | .7 | .8 |
| FRUITS AND VEGETABLES | 226.8 | 3.4 | .1 | -.2 |
| FOOD AWAY FROM HOME | 241.1 | 11.7 | 1.1 | 1.1 |
| HOUSING | 222.4 | 11.3 | 1.2 | 1.2 |
| RENT, RESIDENTIAL | 173.8 | 6.8 | 1.0 | 1.0 |
| HOMEOWNERSHIP | 254.9 | 14.6 | 1.3 | 1.3 |
| FUEL AND OTHER UTILITIES | 232.2 | 7.7 | 2.1 | 2.2 |
| FUEL OIL, COAL, AND BOTTLED GAS | 364.3 | 23.2 | 4.1 | 4.8 |
| GAS (PIPED) AND ELECTRICITY | 251.6 | 8.2 | 2.6 | 2.6 |
| HOUSEHOLD FURNISHINGS AND OPERATION | 189.2 | 7.5 | .3 | .4 |
| APPAREL AND UPKEEP | 166.1 | 3.9 | .4 | .0 |
| TRANSPORTATION | 207.7 | 13.4 | 2.4 | 1.8 |
| NEW CARS | 165.8 | 8.7 | .9 | 1.1 |
| USED CARS | 205.4 | 11.3 | 2.7 | -.5 |
| GASOLINE | 247.7 | 29.1 | 5.5 | 5.0 |
| PUBLIC TRANSPORTATION | 193.3 | 3.1 | .4 | .7 |
| MEDICAL CARE | 236.3 | 8.9 | .5 | .6 |
| MEDICAL CARE SERVICES | 254.4 | 9.4 | .5 | .6 |
| ENTERTAINMENT | 187.8 | 6.6 | .7 | .5 |
| OTHER GOODS AND SERVICES | 193.9 | 7.5 | .4 | .5 |
| PERSONAL CARE 1/ | 193.9 | 7.5 | .6 | .6 |
| COMMODITIES | 205.8 | 10.9 | 1.2 | .9 |
| COMMODITIES LESS FOOD AND BEVERAGES | 192.9 | 10.9 | 1.5 | 1.0 |
| NONDURABLES LESS FOOD AND BEVERAGES | 195.7 | 12.0 | 2.0 | 1.9 |
| DURABLES | 189.2 | 10.0 | 1.1 | .5 |
| SERVICES | 229.5 | 10.3 | 1.1 | 1.3 |
| ALL ITEMS LESS FOOD | 203.9 | 10.5 | 1.3 | 1.2 |
| ENERGY 1/ | 260.8 | 19.8 | 4.2 | 4.2 |
| ALL ITEMS LESS FOOD AND ENERGY | 204.1 | 9.5 | .9 | .9 |

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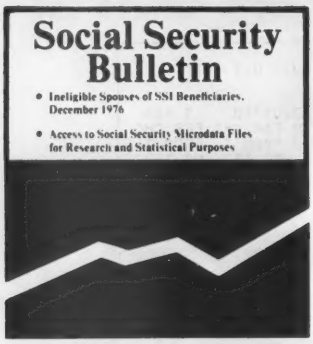
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